



**Superior Court of California
COUNTY OF ALAMEDA**

Finance and Facilities Division
René C. Davidson Courthouse
1225 Fallon Street, Oakland, CA 94612

TITLE: Local Contracting Manual

EFFECTIVE DATE: Revision effective June 26, 2020

CONTACT: Procurement, Finance and Facilities Division

GOVERNING STATUTES AND RULES: Judicial Branch Contracting Manual (JBCM)

RELATED COURT PROCEDURES AND POLICIES: Disabled Veteran Business Enterprise Program and Small Business Preference Program.

FORMS AND REFERENCES: See Appendices.

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1.0 Purpose

This Local Contracting Manual was adopted by the Superior Court of California, County of Alameda (referred to as “Court” throughout the remainder of this document) in accordance with the requirements of the Judicial Branch Contracting Manual (JBCM). This Local Contracting Manual supersedes and replaces all previous Local Contracting Manuals. This manual supplements and incorporates by reference the provisions of the JBCM.

2.0 Assignments

In accordance with JBCM Chapter 1, Section 1.1.C.1, the Court assigns the following persons or positions to perform the specified procurement or contracting activity.

Assignment	Person(s) or Position(s) Assigned	Roles and Responsibilities
Procurement and Contract Analyst	Procurement and Contract Analyst	<ul style="list-style-type: none"> Responsible for all procurement and contracting within the JBE. Ensures that all procurement and contracting activities within the JBE comply with applicable procurement laws. Provides the necessary resources to ensure that all staff are properly qualified and trained in all aspects of the procurement process. Oversees development of the Local Contracting Manual.
Buyer*	Michael Anolin, Fiscal Services Specialist Marjie Harris, Fiscal Services Specialist	<ul style="list-style-type: none"> Performs day-to-day purchasing and contracting activities. Is knowledgeable about applicable procurement laws and best practices. Ensures that the needs of the JBE are met within applicable procurement laws. Maintains the procurement file and related documentation.
ADA Coordinator *	Adam Byer, Administrator	<ul style="list-style-type: none"> Assists and responds to questions or concerns regarding procurement related accommodation needs.

Assignment	Person(s) or Position(s) Assigned	Roles and Responsibilities
DVBE Advocate*	Procurement and Contract Analyst	<ul style="list-style-type: none"> Identifies potential DVBE prime contractors or subcontractors and potential contracting opportunities. Makes information regarding pending solicitations available to certified DVBE firms capable of meeting the JBE's business needs (MVC 999.12).
Procurement-Card Coordinator*	Procurement and Contract Analyst	<ul style="list-style-type: none"> Ensures compliance with relevant procurement card procedures and contract terms. Adds, deletes, and alters card restrictions/limits. Reviews billing reports to monitor payments and disputes.
Protest Hearing Officer**	Procurement and Contract Analyst	<ul style="list-style-type: none"> Evaluates protests. Issues written determinations regarding protests.
Protest Appeals Officer***	Director of Finance & Facilities Division	<ul style="list-style-type: none"> Evaluates protest-related appeals. Issues written determinations regarding appeals of protests.
Payment Officer	Jan Tillman, Senior Accountant	<ul style="list-style-type: none"> Ensures timely payment of invoices. Ensures that proper internal approvals have been secured before processing payment.
Contract Administrator	Procurement and Contract Analyst	<ul style="list-style-type: none"> Responsible for the performance of all contract administration functions. Delegates the authority and responsibility to perform certain contract administration functions to other Court employees. Establishes clear lines of authority for the management and conduct of contract administration functions.

Assignment	Person(s) or Position(s) Assigned	Roles and Responsibilities
Contract Administrator (continued)	Procurement and Contract Analyst	<ul style="list-style-type: none"> Maintains record of each contract administrator and a description of their function within the Court.

- * If no person or position is designated for this assignment, the Procurement and Contract Analyst will be responsible for performing this assignment.
- ** If no person or position is designated for this assignment, the buyer's supervisor will be responsible for performing this assignment.
- *** If no person or position is designated for this assignment, the protest hearing officer's supervisor will be responsible for performing this assignment.

3.0 Settlement Agreements

The following persons or positions have the authority to bind the Court to a settlement agreement resulting from a contract dispute:

1. Presiding Judge
2. Court Executive Officer

4.0 Signature Authority

The following persons or positions are authorized to enter into, extend, amend, terminate or transfer the following contracts and purchase orders.

Position	Approval Threshold
Presiding Judge or Executive Committee (if applicable)	Any value
Executive Officer	Any value
Assistant Executive Officer	Any value
Director of Finance & Facilities Division	Any value

The signature authorities are authorized from the Presiding Judge to the positions listed above in the document titled Expenditure Authorization. The Expenditure Authorization document is available at [http://www.alameda.courts.ca.gov/resources/documents/2020-06%20Expenditure%20Authorization\(1\).pdf](http://www.alameda.courts.ca.gov/resources/documents/2020-06%20Expenditure%20Authorization(1).pdf).

5.0 Approval of Purchase Requisitions

The following persons or positions are authorized to approve purchase requisitions:

Cost Center & Description	Level 1 Budget Approver	Level 2 Up to \$10,000 Director Approval	Level 3 Over \$10,000 Executive Approver
1-1001 Judicial Services	Jenny Lee	Elizabeth Erickson	Melanie Lewis
1-1101 Executive Office	Jenny Lee	Elizabeth Erickson	Melanie Lewis
1-1103 Executive Office Projects & Programs	Jenny Lee	Adam Byer	Melanie Lewis
1-1201 Legal Services	Jenny Lee	Elizabeth Erickson	Melanie Lewis
1-1301 Criminal Division	Jenny Lee	Tracy Wellenkamp	Melanie Lewis
1-1401 Civil Division	Jenny Lee	Caryn Downing	Melanie Lewis
1-1402 Probate	Jenny Lee	Caryn Downing	Melanie Lewis
1-1501 Family Division	Jenny Lee	Charlotte Marin	Melanie Lewis
1-1510 Family Law Facilitators/Self Help Services	Jenny Lee	Charlotte Marin	Melanie Lewis
1-1601 Court Attendants	Jenny Lee	Charlotte Marin	Melanie Lewis
1-1701 Human Resources Division	Jenny Lee	Glenys Rogers	Melanie Lewis
1-1801 Finance & Facilities Division	Jenny Lee	Melanie Lewis	Melanie Lewis
1-1806 Facilities Unit	Jenny Lee	Melanie Lewis	Melanie Lewis
1-1901 Office of Information Technology	Jenny Lee	Jonathan Allen	Melanie Lewis
1-3221 Traffic Division	Jenny Lee	Tracy Wellenkamp	Melanie Lewis
1-4331 Juvenile Division	Jenny Lee	Tracy Wellenkamp	Melanie Lewis
1-5521 Court Reporter Unit	Jenny Lee	Tracy Wellenkamp	Melanie Lewis

Cost Center & Description	Level 1 Budget Approver	Level 2 Up to \$10,000 Director Approval	Level 3 Over \$10,000 Executive Approver
1-5621 Jury Services	Jenny Lee	Caryn Downing	Melanie Lewis
1-5721 Court Interpreters	Jenny Lee	Caryn Downing	Melanie Lewis
1-5821 Records Management/Appeals/Exhibits	Jenny Lee	Caryn Downing	Melanie Lewis
1-6666 Grants	Ngoc-Oanh Guise	Melanie Lewis	Melanie Lewis
1-5555 Reimbursements: Enhanced Collections, FHOs, Small Claims, etc.	Jenny Lee	Melanie Lewis	Melanie Lewis

6.0 Solicitation Document Type

The Court may elect to use a Request for Quote solicitation for all non-complicated, low risk procurements for non-IT goods, non-IT services and any combination of IT goods and services up to \$100,000. At the Court's discretion the bid may be awarded to the lowest responsible bidder or the highest scored bid.

7.0 Advertising

The Court may choose to advertise non-complicated solicitations of non-IT or IT goods and/or services valued at less than \$50,000 in a twelve month period for less than the ten working days, as stated in JBCM Chapter 4, Section 4.1.D.3 (Timing of advertising). The advertising period for such solicitations will be no less than three working days.

8.0 Non-Competitive Bid Procurements

Non-competitive bid requests, including sole-source requests and special category non-competitively bid contract requests (SCR), which require approval may be approved using a memorandum or a form substantially in the form of the Non-Competitive Bid Request Form or the Special Category Non-Competitive Bid Request Form included in the Appendices. In addition to the Presiding Judge and their delegate(s), the following persons/positions are authorized to approve non-competitive bid procurements:

Non-competitive Bid Value	Persons(s) or Positions(s) Authorized to Sign
\$50,000 and above	Presiding Judge
Any value	Court Executive Officer

9.0 Protests

Protests to solicitations issued by the Court will be handled as set forth in Chapter 7 (Protests) of the JBCM, including protest thresholds, the deadlines for receipt of protests, and the deadline for filing of an appeal. However, the Court will allow 10 calendar days after the Court receives an award protest for non-IT services for the protester to submit the information required per JBCM Chapter 7, Section 7.4.C (Required Information).

10.0 Contract Form

The Court may choose the appropriate contract form to be used based on the requirements established in Chapter 8 (Contracts) of the JBCM. The Court may elect to use a short form agreement for routine purchases of goods and services when the Court determines that not all of the provisions found in the Court's Standard Agreement are appropriate. The use of short form agreements will be limited to non-complicated services that do not include IT services which require special provisions or services with an annual value of more than \$100,000.

11.0 Disabled Veteran Business Enterprise Program

The Court has designed a Disabled Veteran Business Enterprise (DVBE) Program to enhance opportunities for DVBEs. The Court will offer a DVBE incentive for competitive solicitations over \$50,000, unless the DVBE incentive is waived.

12.0 Small Business Preference Program

The Court has designed a Small Business Preference Program to enhance opportunities for small businesses. A bidder may claim a small business preference in competitive solicitations of information technology (IT) goods and services of \$5,000 or over. The Court does not offer a small business preference in connection with non-IT goods or non-IT services.

APPENDIX A

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF ALAMEDA
NON-COMPETITIVE BID REQUEST FORM**

Date Contractor/Vendor Information	Date Submitted: _____ Name of Contractor/Vendor: _____ Contract/Purchase Order No. _____
Description of the goods and/or services to be procured	Insert description here.
Non-Competitive Bid Selection (check one and provide additional information)	<input type="checkbox"/> Emergency Purchase: The goods or services are required as a result of an emergency per JBCM Chapter 5, Section 5.2. <i>Explain:</i> <input type="checkbox"/> Sole Source: The goods or services are the only goods or services that meet the JBE's need per JBCM Chapter 5, Section 5.9. <i>Explain:</i> <input type="checkbox"/> Grant Application Deadline: A grant application submittal deadline does not permit the time needed for a competitive procurement of services. Per JBCM Chapter 5, Section 5.9 a competitive bid is not required. <i>Provide details regarding the grant and the application deadline:</i> <input type="checkbox"/> Amendment: A non-competitive bid amendment does not require a competitive bid per JBCM Chapter 5, Section 5.11: <i>Provide description of contract terms to be change and why the Buyer determined that the amendment is in the court's best interest.</i>
Effort made to solicit competitive bids (if any)	Insert description here.
Support that the pricing is fair and reasonable	For example, prices for comparable goods or services.
Special factors affecting cost or other aspect of the procurement (if any)	Insert description here.

Requesting Employee:

*Signature*_____
*Name*_____
*Title*Requesting Employee's
Manager :_____
*Signature*_____
*Name*_____
Title

This Sole Source Request is:	<input type="checkbox"/> Approved <input type="checkbox"/> Denied
Sole Source Approver:	_____ <i>Signature</i>
	_____ <i>Name</i> _____ <i>Title</i>

APPENDIX B

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF ALAMEDA
SPECIAL CATEGORY NON-COMPETITIVE BID REQUEST FORM**

Pursuant to the Judicial Branch Contracting Manual (JBCM), Chapter 5 (Non-Competitively Bid Procurements), Section 5.10 (Special Category NCB Contract Request) the court is allowed to establish a special category non-competitively bid (NCB) contract request (SCR) when the court determines that a significant number of repeat NCB procurements will occur. The court has determined that the contract identified below will require a significant number of NCB procurements and it is the court's desire to use the Special Category Non-Competitively Bid process for this contract.	
Date Submitted	
Name of Contractor	
Contract Number	
General Description of Goods/Services	
Reason that the contract qualified for the Special Category Non-Competitive Bid Process	<p>___ <i>There is no viable competition; or</i></p> <p>___ <i>Competitive bidding cannot be completed using reasonable efforts before the time such non-IT goods, non-IT services or IT goods and services are required.</i></p> <p><i>Explanation:</i> _____</p> <p>_____</p>
How has the court determined that the pricing is fair and reasonable	<i>For example, prices for comparable goods or services.</i>
Special factors affecting the cost or other aspect of the procurement (if any)	<i>Insert description here.</i>

Requesting Employee:

*Signature*_____
*Name*_____
*Title*Requesting Employee's
Manager:_____
*Signature*_____
*Name*_____
*Title*This SCR NCB Request is: ☐ Approved ☐ Denied

Approver: _____

*Signature*_____
*Name*_____
Title